

Payroll-provider switching checklist

Change providers with a clear handover. Track the records, responsibilities and checks needed before your first payroll in the new system.

Business / team

Pay period / reporting period

Prepared by

Review / target date

Plan the change

- ☐ Agree cutoff dates and a single owner for the changeover.
- ☐ Confirm export access before ending the old service.
- ☐ Assign outstanding payment, remittance and filing responsibilities.
- ☐ Prepare a secure transfer and retention process.

Prepare the records

- ☐ Export employee details, pay settings and payment instructions securely.
- ☐ Collect year-to-date pay, deductions and employer contribution records.
- ☐ Collect approved leave, accrual and other opening balances.
- ☐ Retain prior registers, filings, approvals and payment references.

Verify the first run

- ☐ Reconcile imported values with the source records.
- ☐ Review employee count, hours, earnings and net pay.
- ☐ Confirm payment and remittance setup before release.
- ☐ Save the handover approval and resolve outstanding items.

Outstanding actions / reviewer

The checklist organizes a migration; it does not transfer data or decide who must file or remit. Confirm responsibilities with both providers and your payroll adviser.